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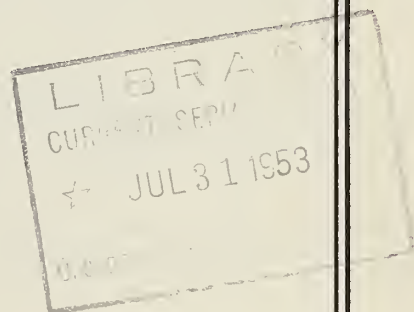
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FARM CREDIT ADMINISTRATION
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D. C.

MERCHANDISING COMMERCIAL FROZEN FOODS
BY
LOCKER PLANTS, 1952

By
L. B. MANN
and
PAUL C. WILKINS



A study conducted with funds provided
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COOPERATIVE RESEARCH AND SERVICE DIVISION

UNITED STATES DEPARTMENT OF AGRICULTURE
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WASHINGTON 25, D. C.
I. W. OUGGAN, GOVERNOR

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FOREWORD

The freezing of food commercially is one of the most important developments in food processing in many years. Frozen fruits, vegetables, poultry, meats, seafoods, fruit juices, and specialties - of ever widening variety - increased tenfold on our markets from 1938 to 1952. In 1952 some 1,300 commercial frozen food packers processed about 3 billion pounds of frozen food. An additional 1 1/2 billion pounds (mostly meat and poultry) was processed in about 11,000 frozen food locker plants.

Great progress also has been made in improving processing, freezing, and packaging methods. A whole new refrigerated transportation system is being developed and great headway has been made in providing adequate low temperature storage facilities at large distributing centers. Likewise, modern self service retail stores have initiated important changes in merchandising frozen foods.

The most recent and what may prove to be one of the truly revolutionary elements in today's food distribution picture is the home freezer. Today's 5 million home freezers, plus an additional 5 million individual lockers available in over 11,000 locker plants, with an estimated capacity of nearly 90 million cubic feet of zero space are capable of storing from 2 1/2 to 3 billion pounds of frozen food.

Despite notable advances in production, processing, and storage, the future expansion of the frozen food industry is seriously handicapped by an inefficient and costly distribution system. The very nature of the product demands costly refrigeration handling. Also, under present conditions there are too many steps in the distribution process. Frozen foods are often warehoused 3 to 6 times before reaching the retail store. Frequent and long distance wholesale delivery of small orders also results in high distribution costs.

Methods of reducing some of these excessive costs are badly needed. An encouraging factor is the expanded use of home freezers and locker plants by consumers who purchase frozen food in bulk quantities at less than retail price. Likewise, locker plants, distant from large distributing centers, may act as local storage and wholesale distributing points for commercial frozen foods in their nearby areas. They may offer additional possibilities for economies in transportation and distribution.

This study was made to ascertain the extent to which locker plants operate as wholesalers and retailers of commercial frozen food; to appraise the effectiveness of the methods they use; to determine the location and amount of low temperature bulk storage in these plants; and to ascertain the potential advantages, if any, to locker plants, and to the public, in expanding the use of these plants in distributing frozen food.

MERCHANDISING COMMERCIAL FROZEN FOODS BY LOCKER PLANTS, 1952

By

L. B. Mann and Paul C. Wilkins
Agricultural Economists

More than 11,000 food locker plants scattered over the United States play an important role in processing, freezing, and storing locally grown food, as well as in merchandising commercial frozen food for locker patrons and home freezer owners. Some locker plants also act as wholesale distributors of frozen food in their trade territory.

This study, the first phase of a broad review of the role of frozen food locker plants in distributing commercial frozen foods was made by Farm Credit Administration with funds provided under the Agricultural Marketing Act of 1946. The National Frozen Food Locker Institute asked for the study and it was recommended by the Cold Storage Advisory Committee in 1952. A survey was made of merchandising commercial frozen foods by frozen food locker plants. Information was collected on the location of locker plants merchandising commercial frozen food, volume and type of sales, margins, discounts, merchandising practices, use of display cabinets, and extent of delivery service. Information was also collected on the pooling of purchases and availability of bulk zero space in locker plants.

Questionnaires were mailed to 2,293 locker plant operators who were members of the National Institute.¹ A total of 1,350 useable questionnaires, or 59 percent of the number surveyed, were returned.

This study gives the status of the frozen food locker industry in merchandising commercial frozen food. It presents some of the problems confronting locker plants in purchasing and selling frozen food; it points out some of the weaknesses and inefficiencies in present operating methods; and it indicates the need for further research as a means of effecting improvements in distributing and merchandising commercial frozen foods through locker plants.

¹This sample, as compared with a comprehensive survey of the entire industry made in 1950, indicates some bias in the following respects. A moderately greater percentage of the plants reporting were in larger towns; locker capacity of plants was about 20 percent above the national average; and reports received were from a smaller proportion of plants located in the Western States.

Note: The authors express their appreciation to the National Frozen Food Locker Institute and to its members cooperating in this study and to Etta C. Emmons of the Farm Credit Administration for assistance in coding and compiling the statistical data.

PLANTS SELLING COMMERCIAL FROZEN FOOD

Merchandising commercial frozen foods by frozen food locker plants has grown in recent years both in number of plants and in total volume of commercial frozen food handled. Sixty-three percent of the 1,350 locker plants reporting on their 1952 business said they were selling commercial frozen foods. This is a one-fourth increase over the number of plants selling frozen foods in 1950.

Plants selling commercial frozen foods by regions, 1952

Region	Plants reporting	Percentage selling frozen foods
North Atlantic.....	154	82
North Central.....	816	59
South Atlantic.....	116	66
South Central.....	114	54
Mountain.....	46	76
Pacific.....	104	66
Total and average.....	1,350	63

The percentage of plants selling frozen foods is shown by regions on the accompanying map. More of the locker plants in the North Atlantic and Mountain States (82 and 76 percent respectively) merchandise commercial frozen foods than elsewhere in the country. Locker plants in these regions generally have a relatively low custom processing volume.

Therefore, these locker operators, to supplement their income, are more inclined to take on new activities. Fewer locker plants in the South Central States sell frozen food due possibly to the distance of many plants from frozen food wholesalers, as well as low average income in many parts of this region.

Plants selling frozen foods by size of town, 1952

Size of town	Plants reporting	Percentage selling frozen foods
1,000 and under....	416	59
1,001-2,000.....	242	55
2,001-5,000.....	232	63
5,001-10,000.....	163	67
10,001-25,000.....	150	73
Over 25,000.....	147	71
Total and average.....	1,350	63

The size of the towns in which locker plants are located appears to have some influence on the decision of locker operators to sell commercial frozen foods. Possibly lower average income plus greater supplies of locally grown fruits and vegetables account for the smaller percentage of locker

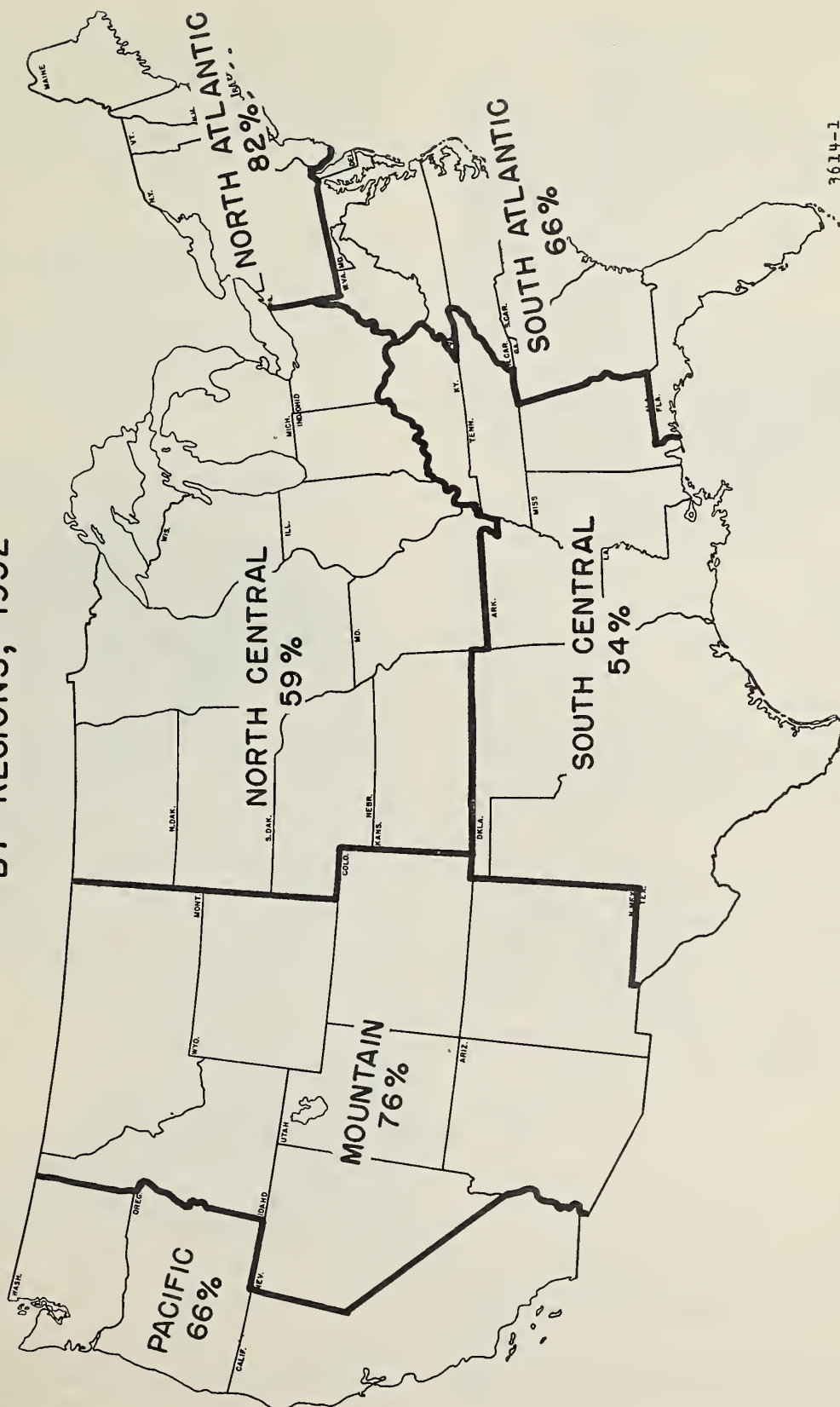
plants selling commercial frozen foods in small towns. Another reason may be the high cost of distributing frozen foods to these small towns.

The average number of lockers installed in the plants reporting was 557, of which 87 percent were rented on January 1, 1953. In a national survey conducted in 1950, about 84 percent of the lockers installed were rented. No appreciable difference was found in the percentage of lockers rented in plants that sell and plants that do not sell commercial frozen foods.

SALE VOLUME

Sales of commercial frozen foods in 1952 averaged \$8,415 per plant. The Pacific and North Atlantic regions led in volume of sales. In these

PERCENTAGE OF PLANTS SELLING FROZEN FOODS BY REGIONS, 1952



Average sales volume by regions, 1952		
Region	Plants reporting	Average sales
North Atlantic.....	120	\$14,104
North Central.....	456	5,334
South Atlantic.....	73	8,836
South Central.....	58	9,353
Mountain.....	30	9,667
Pacific.....	64	17,773
Total and average.....	801	\$8,415

regions considerable promotion has been given to "freezer food plans." Also operators here, among the first to develop merchandising programs in their locker plants have had considerable merchandising experience.

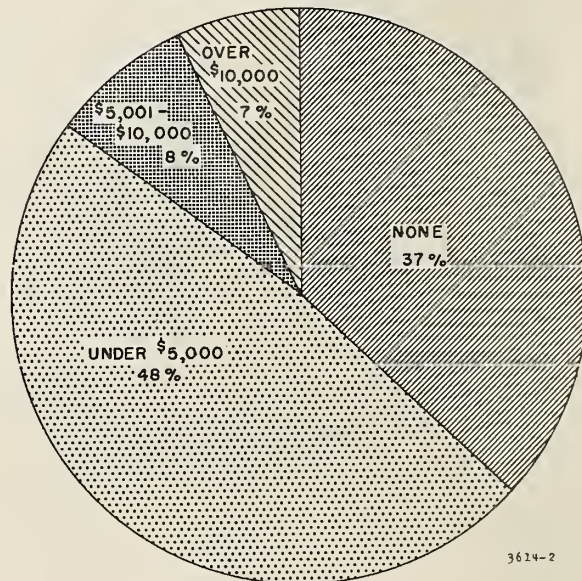
The North Central region had the lowest average sales volume. About 70 percent of the plants in this region are located in towns of less than 2,000 compared with 40 percent

for the rest of the country. Also, these plants are generally smaller than in other regions. Both conditions tend to limit sales of commercial frozen foods.

The low sales volume in most frozen food locker plants presents a serious problem with respect to the price locker plants must pay for their frozen foods. Low volume generally means inability to purchase from wholesalers at a price that permits locker plants to capitalize on their "bulk selling" discount program.

Of the plants with sales volume of more than \$10,000, about two-fifths were between \$10,000 and \$25,000, about one-third between \$25,000 and \$50,000, and the rest were above \$50,000.

PERCENTAGE OF PLANTS BY VOLUME OF FROZEN FOOD SALES, 1952



WHO ARE THE CUSTOMERS?

Of the 801 plants selling commercial frozen foods, 64 percent sell at retail only, and 36 percent sell both at retail and at wholesale.

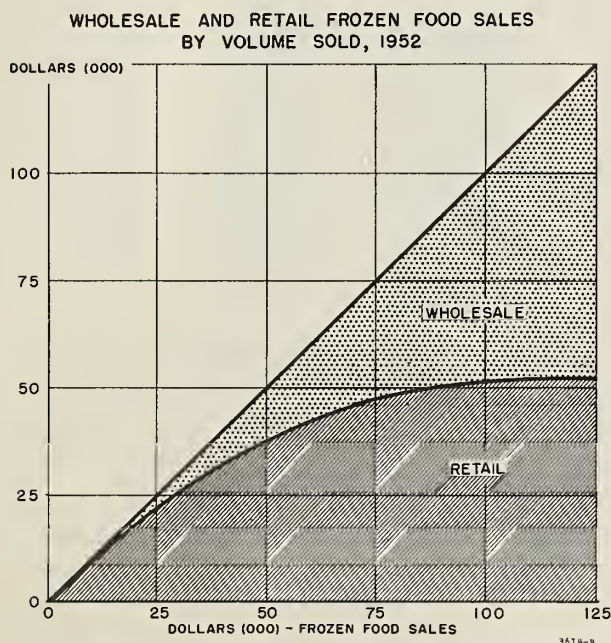
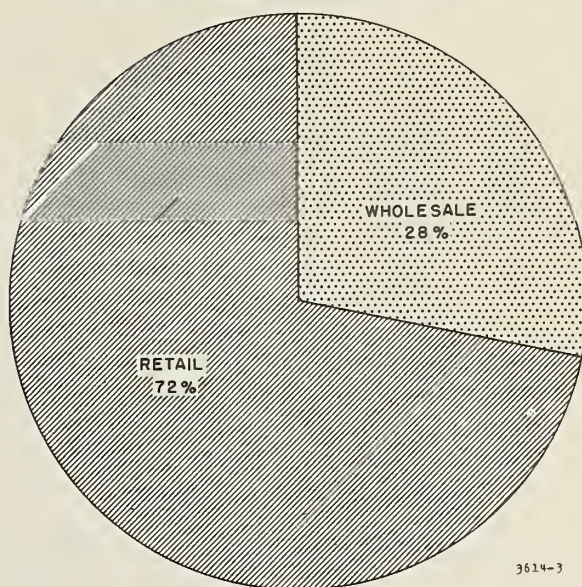
Percentage of 801 plants reporting by retail and wholesale operations, 1952	
	Percentage
Retail only.....	64
Retail and wholesale.....	36
Total.....	100

None of the plants reporting operated exclusively as wholesalers. Wholesale is defined as quantity sales to other than individual consumers such as stores, restaurants, hotels, and institutions.

About 72 percent of the commercial frozen food sold by these locker plants is sold at retail to locker patrons, home freezer owners, and other individuals while 28 percent is sold at wholesale. Locker plants in the North Central and South Central regions sold at retail more than three-fourths of their volume while plants in the south Atlantic States sold at wholesale more than half their volume.

Until a few years ago practically all the frozen food handled by locker plants was sold at retail. The recent development of wholesale commercial frozen food business by locker plants may prove to be an important factor in reducing costs and improving efficiency in the distribution of frozen foods.

DISTRIBUTION OF FROZEN FOOD SALES
BY WHOLESALE AND RETAIL, 1952



Plants with small sales volume had little wholesale business. In many instances they had only an occasional or special sale for banquets and school lunch programs. The selling price in these cases was usually a little above cost price to the locker plant.

Only in plants with over \$50,000 in total sales was the wholesale volume important.

SIZE OF TOWN AND SALES VOLUME

There appears to be a relationship between size of town and volume of commercial frozen food sold. Ninety-three percent of the plants selling frozen foods in towns of 1,000 or less had a sales volume of less than \$5,000. In contrast only 47 percent of the plants selling frozen foods in towns

Percentage of 824 plants by
volume of frozen food sales,
and size of town, 1952

Size of Town	Under \$5,000	\$5,001- \$10,000	Over \$10,000
1,000 or under	93%	5%	2%
1,001 - 2,000	88	7	5
2,001 - 5,000	71	15	14
5,001 - 10,000	66	24	10
10,001-25,000	64	16	20
Over 25,000	47	13	40

of over 25,000 had sales under \$5,000, while 40 percent had sales over \$10,000. The data indicate that plants in towns of over 2,000 have much better opportunity for substantial sales than plants located in smaller towns.

TYPE OF PACKAGE

Most of the commercial frozen foods sold by locker plants is in consumer size package, yet, a significant amount (15 percent) was sold in institutional size packages. Locker operators are attempting to satisfy the demand of many frozen food consumers for lower prices by handling frozen foods in the less expensive institutional package. With the increasing use of home freezers there is a much better opportunity for housewives to use larger size packages.

Sales of frozen foods by type
of package, by regions, 1952

Region	Consumer	Institutional
North Atlantic..	83%	17%
North Central...	83	17
South Atlantic..	80	20
South Central...	89	11
Mountain.....	76	24
Pacific.....	93	7
Average.....	85	15

SALES CABINETS

Three-fourths of all plants selling frozen foods had refrigerated sales cabinets while one-fourth of the plants sold commercial frozen foods directly from their freezer or bulk zero storage. Of the plants with sales cabinets, 81 percent had display cabinets and 19 percent were of the non-display type.

Plants selling frozen foods
that use sales cabinets, by regions, 1952

Region and sales volume	Sales Cabinets	Type of Sales Cabinet	
		Display	Non-display
North Atlantic....	81%	84%	16%
North Central.....	70	78	22
South Atlantic....	80	88	12
South Central.....	79	64	36
Mountain.....	86	91	9
Pacific.....	81	94	6
Average.....	75	81	19

Only 70 percent of the plants selling commercial frozen foods in the North Central region have any type of sales cabinet compared with about 81 percent for the rest of the country. Display cabinets are found most frequently in the Mountain and Pacific regions and

least frequently in the North Central and South Central regions.

Only 62 percent of the plants with retail sales volume under \$2,000 had sales cabinets, while 89 percent of the plants had sales cabinets where their retail sales volume exceeded \$5,000. Display cabinets

were found most frequently in plants with a retail sales volume of more than \$10,000.

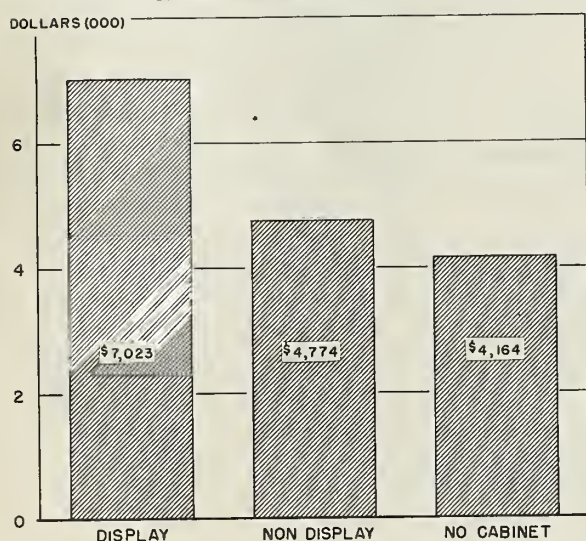
SALES CABINETS AND VOLUME OF RETAIL SALES

Retail sales of commercial frozen foods averaged \$6,070 per plant. Plants with display cabinets averaged more than 50 percent higher sales than those without display cabinets. Plants with non-display cabinets and plants with no cabinets of any type showed relatively small difference in volume of retail sales.

Plants selling frozen foods
that use sales cabinets, by volume of retail sales, 1952

Region and sales volume	Sales cabinets	Type of sales cabinet	
		Display	Non-display
Under \$1,000	71%	85%	15%
1,000 - 2,000	59	80	20
2,001 - 5,000	75	78	22
5,001 - 10,000	91	84	16
10,000-25,000	88	92	8
Unknown.....	56	81	19
Average....	75	81	19

AVERAGE RETAIL SALES PER PLANT BY TYPE
OF SALES CABINET, 1952



As would be expected, the plants with the largest retail sales volume on the average had the largest display cabinets. Those with display cabinets under 10 cubic feet had average retail sales of \$2,531. Plants with display cabinets between 10 and 19 cubic feet averaged \$3,291, while those with cabinets between 20 and 29 cubic feet averaged \$5,872 in retail sales. Plants with display cabinets totaling more than 30 cubic feet had average retail sales of \$12,109.

While the average plant with display cabinets had higher sales volume than those with non-display

or no cabinets, yet there were numerous exceptions. For example, plants with no cabinets in the Pacific and South Central regions, on the average, equalled or exceeded the retail sales volume of plants with sales cabinets. With the increasing sale of frozen foods in quantity lots to locker patrons and home freezer owners the advantages of display cabinets may become of less importance.

DELIVERING COMMERCIAL FROZEN FOODS

On the average only 6 percent of the 850 plants handling frozen foods operate trucks for making wholesale deliveries, and 10 percent operate trucks to make deliveries of frozen foods to owners of home freezers.

Plants selling frozen foods that operate trucks, 1952

Region	Wholesale delivery	Home freezer delivery
North Atlantic	10%	16%
North Central.	3	7
South Atlantic	12	6
South Central.	6	15
Mountain.....	9	14
Pacific.....	9	29
Average.....	6	10

The highest percentage of plants making wholesale deliveries was found in the South Atlantic region. This region also has the largest percentage of wholesale sales to total sales. Delivery of commercial frozen foods to home unit owners was most prevalent in the Pacific and North Atlantic regions which is probably due to the rather large scale "food plan" programs in these areas.

The small percentage of plants in the North Central region operating trucks for any kind of commercial frozen food delivery reflects the small percentage of plants engaged in selling commercial frozen food and the low sales volume of those plants with a frozen food merchandising program.

DISTANCE FROM MAJOR SUPPLIERS OF FROZEN FOOD

Forty-six percent of the locker plants were located over 50 miles from their major suppliers while 16 percent were more than 100 miles away.

Plants at various distances from major supplier of frozen foods, 1952

Miles	Percentage
Under 5.....	5
5-9.....	3
10-24.....	17
25-49.....	29
50-99.....	30
100 and over.....	16
Total.....	100

Locker plants, located in towns 50 miles or more from central distributors, might perform a worthwhile service by acting as sub-distributors of frozen food to local retail stores, institutions, and others through purchasing and storing in truck load lots for nearby distribution.

EXTENT OF POOLING PURCHASES

Only 6 percent of the locker plants selling frozen food pooled their purchases with other plants in order to buy in large quantities and on more favorable terms.

The highest percentage of such plants are located in the Atlantic Coast States, with the lowest in the Pacific Coast and North Central regions.

Plants selling frozen foods that pool purchases, by regions, 1952

Region	Percentage
North Atlantic.....	11
North Central.....	5
South Atlantic.....	11
South Central.....	7
Mountain.....	6
Pacific.....	4
Average.....	6

Less than 5 percent of locker plants under 50 miles from major suppliers pooled purchases while nearly 8 percent of those more than 50 miles away followed this practice. Lack of volume is one of

a locker plant's greatest weaknesses from the standpoint of purchasing frozen food. Pooling with other plants so as to increase volume would appear to be a practical way of improving this situation.

BULK ZERO STORAGE

Sixty-two percent of the locker plants selling frozen food reported bulk zero storage in their plants. Bulk zero storage was found most frequently in the North Atlantic and Pacific regions and least frequently in the North Central and Mountain regions. Excluding the North Central region about 28 percent of the plants have bulk zero storage space of more than 2,000 cubic feet each, and approximately 7 percent have more than 10,000 cubic feet each. Plants in towns of over 5,000 reported the greatest amount

Plants selling frozen foods that have various amounts of bulk zero storage, 1952

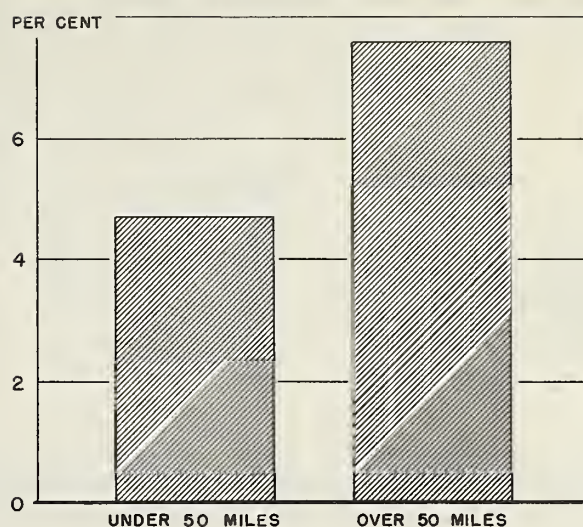
Cubic feet	Percentage
None.....	38
Under 500.....	22
500-999.....	8
1,000-1,999.....	12
2,000-3,999.....	10
4,000 and over.....	<u>10</u>
Total.....	100

¹One-half of these plants reported bulk zero space in excess of 10,000 cu. ft.

of bulk storage. The fact that many locker plants have bulk zero space offers possibilities for storing and distributing frozen foods to retailers and others in their trade territory.

selling frozen foods rented bulk zero space to frozen food distributors. The highest percentage of plants renting storage space were in the South Central and South Atlantic regions and the lowest in the North Central regions. Renting bulk storage space to frozen food distributors frequently results in lower cost frozen foods to the locker operator by reducing transportation costs.

PLANTS THAT POOL PURCHASES BY DISTANCE FROM MAJOR SUPPLIER, 1952



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BULK ZERO SPACE RENTED TO DISTRIBUTORS

For the country as a whole 12 percent of the locker operators

Plants selling frozen foods that rent bulk zero space to distributors, by regions, 1952

Region	Percentage
North Atlantic.....	14
North Central.....	10
South Atlantic.....	17
South Central.....	18
Mountain.....	15
Pacific.....	<u>16</u>
Average.....	12

WHOLESALE MARK-UP

Average wholesale mark-up on frozen foods for 258 plants reporting was 12 percent. The average mark-up was more or less uniform in all regions

Percentage of plants with indicated wholesale markup
on frozen food by regions, January 1, 1953

Region	Plants reporting	Markup (percentage)-						Average markup
		Under 5	5-9	10-14	15-19	20-24	25 and over	
North Atlantic.....	46	4%	20%	46%	13%	11%	6%	12%
North Central.....	120	3	26	42	23	6	0	11
South Atlantic.....	35	0	14	51	29	6	0	12
South Central.....	23	0	9	69	13	9	0	12
Mountain.....	15	0	7	73	13	7	0	11
Pacific.....	19	0	0	47	42	11	0	14
Total and average..	258	2	19	49	22	7	1	12

except the Pacific where it was 14 percent. Forty-nine percent of all plants reporting had mark-ups between 10 and 14 percent and 22 percent of the plants between 15 and 19 percent.

The North Atlantic region had the widest range in mark-up - from under 5 percent to over 25 percent. The Pacific region had the smallest range - from 10 to 24 percent.

No significant difference was found in the average wholesale mark-up among plants located in different size towns. It was only in towns over 25,000 that there appeared to be a tendency toward higher mark-ups.

RETAIL MARK-UP

The average retail mark-up for 805 plants reporting was 22 percent. The average mark-up was uniform for all regions. Thirty-six percent of the plants had a mark-up between 20 and 24 percent and 43 percent of the plants had a mark-up of 25 percent or more. Of those plants with mark-ups

Percentage of plants with indicated retail markup
on frozen food by region, January 1, 1953

Region	Plants reporting	Markup (percentage)-						Average markup
		Under 5	5-9	10-14	15-19	20-24	25 and over	
North Atlantic.....	122	0%	1%	7%	16%	30%	46%	22%
North Central.....	458	1	1	6	14	38	40	21
South Atlantic.....	71	0	0	11	9	28	52	22
South Central.....	57	0	0	9	7	31	53	22
Mountain.....	33	0	0	12	15	40	33	21
Pacific.....	64	0	2	9	11	33	45	22
Total and average.	805	(1)	1	7	13	36	43	22

¹Less than .5 percent.

of 25 percent or more, 86 percent had a mark-up of 25 percent and 9 percent had 30 percent.

Mark-up in plants located in different size towns was much alike except plants located in towns under 1,000 and over 25,000 tended to hold mark-up below the 25 percent level.

DISCOUNTS

Many locker plants offer discounts from retail price on a single purchase of 12 or more packages of commercial frozen foods. It is a method of building volume with locker renters and home freezer owners who have

Extent of discount on frozen foods sold at retail
in quantity lots,¹ by regions, 1952

Region	Plants allowing discount	Average discount from retail	Retail sales sold in quantity lots
North Atlantic.....	95%	10%	49%
North Central.....	84	9	29
South Atlantic.....	89	10	46
South Central.....	82	10	39
Mountain.....	86	9	74
Pacific.....	<u>91</u>	<u>11</u>	<u>63</u>
Average.....	87	9	44

¹Quantity lot sale is defined as a retail sale of 12 or more packages of commercial frozen foods on which is given a discount from retail price.

facilities for storing large quantities of frozen foods. The practice is generally followed throughout the country and is particularly important in the North Atlantic and Pacific regions - areas of widespread "food plan" promotion.

These data indicate that locker renters and home freezer owners like this method of merchandising. About 44 percent of retail sales volume of these plants was handled on a bulk basis.

SUMMARY AND CONCLUSIONS

1. Nearly two-thirds of the locker plants surveyed sell commercial frozen food, and the percentage is growing.
2. Sales volume per plant is small, averaging \$8,400 in 1952. Four percent had sales of over \$50,000.
3. Nearly two-thirds of plants selling frozen foods retail only, while 36 percent both retail and wholesale.
4. Seventy-two percent of all commercial frozen food is sold at retail to locker patrons, home freezer owners, and other consumers. Twenty-eight percent is sold to stores, institutions, restaurants, and others.
5. Eighty-seven percent of the plants selling frozen foods offer discounts for quantity purchases. Forty-four percent of their retail sales were in quantity lots. Discounts averaged 9 percent.
6. Eighty-five percent of sales were in consumer-size packages. The trend toward larger institutional-sized packages is growing.
7. Three-fourths of all plants selling frozen food had refrigerated sales cabinets, and 81 percent of these were display type cabinets.
8. Ten percent of the plants selling frozen foods operate trucks for home freezer delivery, and 6 percent provide wholesale trucking service.
9. Only 6 percent of plants selling frozen foods pooled purchases with other plants. Pooling was most prevalent in plants located at considerable distance from suppliers.
10. Almost two-thirds of locker plants selling frozen foods have some bulk zero storage space.
11. Average wholesale mark-up was 12 percent, and retail mark-up 22 percent.

While nearly two-thirds of the locker plants sell commercial frozen food the volume handled by most plants is rather small. To expand their merchandising activities most locker plants need to strengthen their purchasing power through pooling orders with other plants or by other methods. They also need to promote the sale of frozen food in quantity lots to home freezer and locker patrons. In some instances, it may be necessary to provide some form of financing for quantity purchases. In communities located at a considerable distance from terminal distributing centers, locker plants may provide an economical and efficient storage and wholesale distributing service.

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UNITED STATES DEPARTMENT OF AGRICULTURE
FARM CREDIT ADMINISTRATION

FROZEN FOOD DISTRIBUTION BY LOCKER PLANTS

The Department of Agriculture is making a Nation-wide survey of the frozen food locker industry. This study represents an attempt to ascertain the role of locker plants as sub-distributors, wholesalers and retailers of commercial frozen food. Widespread need for information on this new development has prompted numerous requests for this study from individual operators and from the National Frozen Food Locker Institute.

Your cooperation in filling out and returning this schedule promptly will be appreciated. Answers will be treated as strictly confidential and used only in averages or totals to indicate the situation within a State or area. For your convenience in returning this information, we are enclosing an addressed envelope which does not require a stamp.

1. Number of lockers installed on January 1, 1953: _____ Number rented _____
2. Do you sell commercial frozen food? Yes () No ()
If "No" to question 2 ignore remaining questions but please return schedule.
3. What is the population of the town nearest to or in which this plant is located?

1,000 or under ()	2,001 to 5,000 ()	10,001 to 25,000 ()
1,001 to 2,000 ()	5,001 to 10,000 ()	Over 25,000 ()
4. What were your sales of commercial frozen food in 1952 or last fiscal year?

Under \$5,000 ()	\$10,001 - \$25,000 ()	\$50,001 - \$100,000 ()
\$5,000 - \$10,000 ()	\$25,001 - \$50,000 ()	Over \$100,000 ()
5. What percentage of the above sales were -
 - a. Wholesale (stores, institutions, etc.)? _____%
 - b. Retail (locker patrons, home freezer owners, other individuals)? _____%
6. Do you rent or lease "zero" space to frozen food distributors? Yes () No ()
7. What is your average markup over cost price on commercial frozen food sales?
 - a. Wholesale _____%
 - b. Retail _____%
8. How much net piling space do you have available for the zero storage of commercial frozen food? _____ cu. ft.
9. What percentage of your dollar sales volume of commercial frozen food in 1952 was in:
 - a. Consumer size packages? _____%
 - b. Institutional size packages? _____%
10. Do you have frozen food sales cabinets? Yes () No (); Total cu. ft. _____
Type: Display () Non-display ()
11. Do you normally give a discount to retail customers buying in "quantity" lots? (A dozen packages or more) Yes () No ()
 - a. If "Yes" what is average discount? _____%
 - b. What percentage of retail sales are made in quantity lots? _____%
12. Do you operate trucks for -
 - a. Wholesale distribution? Yes () No ()
 - b. Distribution to home freezer patrons? Yes () No ()
13. How many miles are you from your major supplier? _____ Miles.
14. Do you pool purchases with others in buying commercial frozen foods? Yes () No ()

